outside in

The following updates have been made to DealSheet

Version : 2.10

Updated:

1. In response to user requests, DealSheet will now open in a new browser tab
2. NEW: Questions have been added to the application, largely to support the use of *Outside In's Value Builder Canvas* approach. Customers upgrading should not unpack these questions as it will overwrite the current questions in use and remove all answers and sales process configurations. Please contact Outside In to discuss the additional questions and information.
3. NEW: Closure plans - a new capability that allows for Superusers to create a standard template of tasks and events. These closure plans can be used by sales teams to add the pre-templated list of tasks and events to an opportunity, then editing these to create an action plan for an opportunity.
4. NEW: Timeline - Once activated users will see a Timeline in the app menu. The Timeline will keep a log of changes to DealSheet, what is changed, when and by who.
5. Permission sets have been updated to reflect these changes. Also for Standard Users we have removed visibility of tabs and apps that may confuse users (eg "Deal Sheets" where users can access and make changes that then cause problems for the application)

Upgrade package link

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0I000001206A

Notes for upgrade process:

The following process should be used to complete the upgrade

1. Use the link to update the package for Admins only. No post- upgrade activity is needed and users will not notice any differences.
2. To use Closure plans, admins or superusers should create a closure plan(s). This will then be available for sales users.
3. Timeline- Salesforce admins should switch this Timeline OFF if you do not want to use this page in DealSheet. Timeline is turned on by default. To toggle off do this using the checkbox on the DealSheet set up page.

Reference : Installation guide

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Notes for User communications

Closure Plans make it easier for you to add pre-build actions to an opportunity using DealSheet. In many companies there are some standard activities for an opportunity for approval and Closure plans allow you to add a list of tasks and events simply.

For more information on how to use closure plans read the Activity page in the user guide.

DealSheet now opens in a new Browser tab, so this means you can work in Salesforce and DealSheet simultaneously.

Timeline supports more transparent collaboration with your team. When someone makes a change to DealSheet this is shared in the timeline page so you know who in the team made changes, what they were and when they were made.

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